FEMIS User Manual
(First copy – 18th May 2009)

Amendments:

27th May 2009 - Page 10,11,12

Why do we need a new FEMIS Manual?

The aim of this manual is to ensure that we collect all the data that we require for reporting to our providers on our activity. It will also ensure that we collect sufficient data for more localised reports to be provided to each office.

Over the past months I have been visiting the 8 Care and Repair offices to observe general admin practices. What I hope that this manual will enable us to do is to establish best practice across each of the 8 offices. Hopefully you'll recognize some ideas as your own.

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Important Information

Should you have any queries regarding FEMIS data input or wish to add / delete users please email sarah.hadley@dcha.co.uk

If you have problems connecting to FEMIS then please email alana.edwards@dcha.co.uk (based in the Barnstaple office)
Alana will then contact the relevant person at IS or Foundations.

To request new contractors to be added, to update contact details, or to scan across copies of insurance documents email: (DO NOT POST)
devoncare&repaircentralcontractors@dcha.co.uk

1 - Introduction to the System

What is FEMIS?

FEMIS is the Foundations Electronic Management Information System that replaces the original Foundations MIS that has been in existence since June 2000. It has been created to meet the current and future information and monitoring needs of the Home Improvement Agency sector. In particular, FEMIS can populate the Supporting People Work Book that we use as part of our quarterly reports. FEMIS is held centrally on a website which the user logs into, rather than being installed on each individual user's computer.

What can FEMIS do for me?

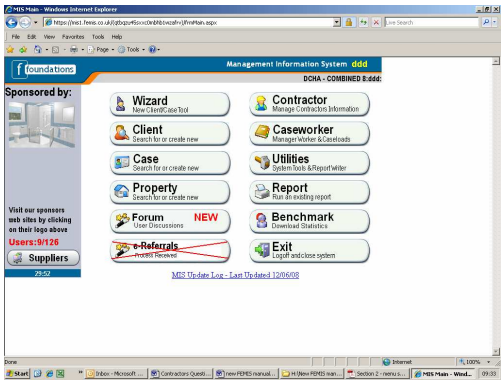
At Devon Care & Repair we use FEMIS to record all our activity. All data input in the system can then be analysed to produce reports for Supporting People or for our internal reporting.

What kind of reports will I be able to produce?

Reporting via FEMIS is simple and comprehensive.
There are a series of pre-designed reports, eg: commonly used management reports.

There is also the opportunity to add different reports onto FEMIS in the "User Defined Reports" section. These can be set up to answer any query you may have. For example: you can pull together lists of open cases or provide totals for work done in the last quarter. If you would like to create your own please contact me for advice (sarah.hadley@dcha.co.uk)

2 - The Menu Screen



The Home Page provides an easy to use menu that takes you to the following features:

Database Name
Our combined database for the 8 local offices of Devon Care and Repair is coded as “ddd”, Commercial Services is “daq”.

Wizard
The wizard supplies a quick and simple method of creating new cases for new and existing clients and properties.

Client
To find a client’s record, input a name or part name in the search facility. This will list all the cases associated with that client. It is a feature of this system that a client’s details can be updated on new cases (client is older, health has deteriorated etc.) whilst retaining the original details on earlier cases that have been completed for that client. In order to meet the new requirement to use the Supporting People Work Book, FEMIS places the client at the centre of the data recording process.

Case The Case section records all the services that have been provided for a client and indicates the outcomes for that client.

Forum This provides the link to the on-line user forum. The Forum is divided into several category areas: General, Suggestions, Problems and What’s New? The forum provides the user with an ideal facility to discuss MIS related issues with other users and Foundations MIS support team.

Contractor This screen allows the creation and management of a contractor database. For Devon Care and Repair this is managed at the Manaton office (in Exeter). You can use the list to find Contractors but any amendments to Contractors details must be sent to the Central Contractors team.

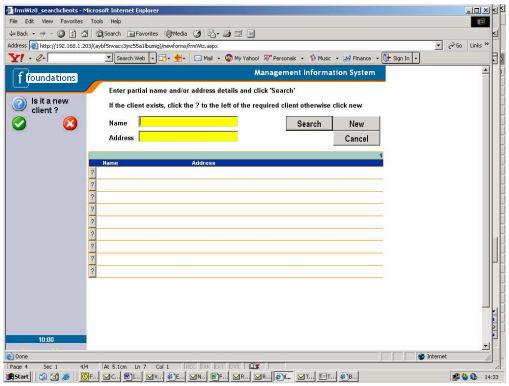
Caseworker This screen allows the creation and management of a Caseworker and Technical Officer Database. A new feature of this screen is the facility to designate the person entered on the screen as a caseworker, a technical officer or someone who fulfils both roles.

Utilities This screen gives access to a number of tools that can be used to tailor FEMIS to the requirements of the user organisation.
Should you wish to change your password, add a new user or have any other queries regarding your access to FEMIS then please contact Sarah Hadley (sarah.hadley@dcha.co.uk)

Report There are a number of Monitoring Reports that can be accessed directly from this screen, including error reports.

3 - Adding a New Case

The Wizard can be used to input new case details for existing or new clients.

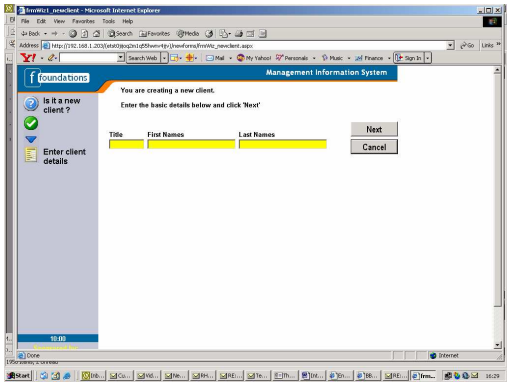

Management Information System
Is it a new client ?
Enter partial name and/or address details and click 'Search'
If the client exists, click the ? to the left of the required client otherwise click new
Name
Address
Search
New
Cancel

Step 1 (New Case)

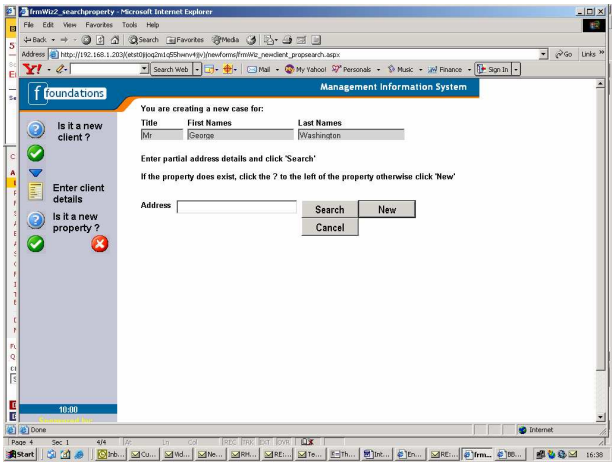
If the client is new to the HIA, Press **NEW**
If you know that the client exists, or you are unsure, you can search for that client using name, part name, or the clients address and press **SEARCH.**

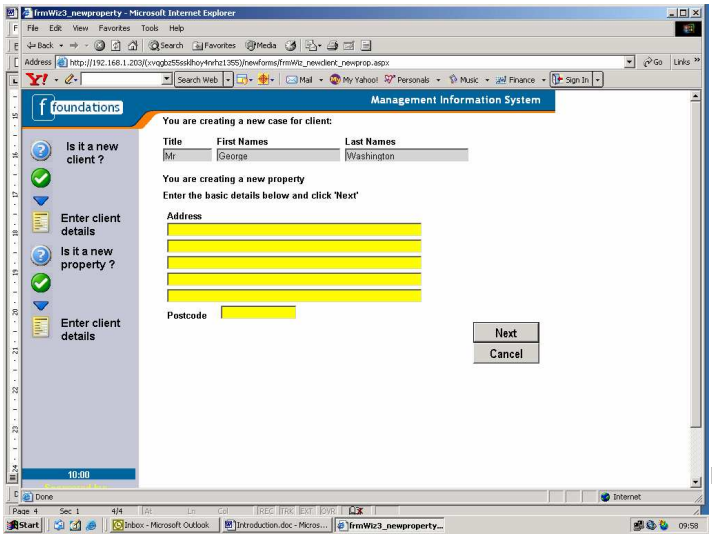
Step 2 (New Client)

To enter details of a new client, start by entering Title, First Name, and Last Name (Last name is a mandatory field) then click on **NEXT**

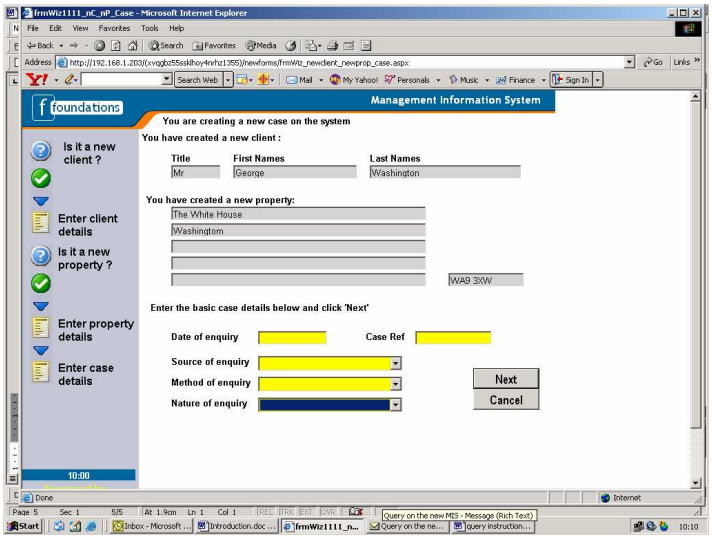


Add the clients address and click on NEXT
Note: if the client lives in a property already on the system, e.g. the new client is a partner of an existing client, then search for that address





Add Initial Enquiry Details



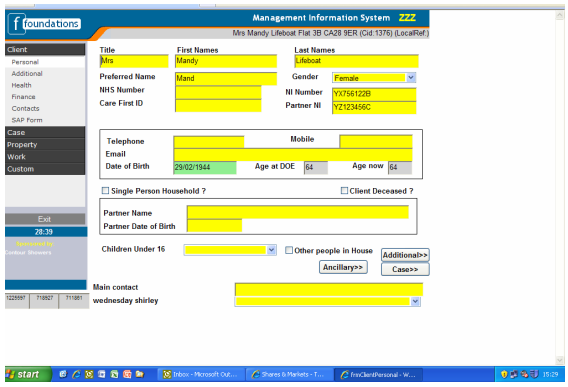
Date of Enquiry: This is a mandatory field (Enter T and this will input today's date)
Case Ref: This is a free text field
Source of Enquiry:
Method of Enquiry:
Nature of Enquiry:

Press **NEXT.**

The case has now been created in the database.

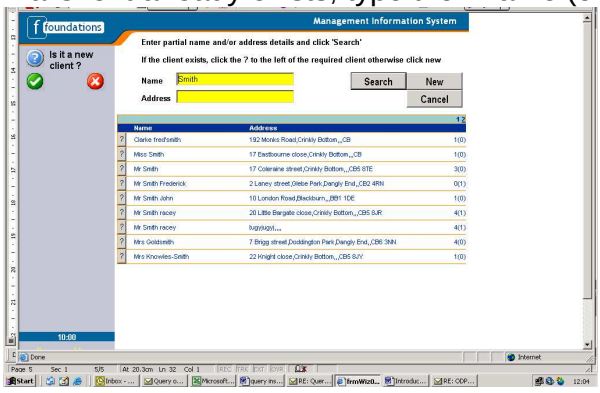
The screen shown is the "Client, Personal" screen. Client's name, address and case number are shown at the top of the screen.

If you now want to input client data, remain on this screen and navigate through the Client screens using the link buttons.

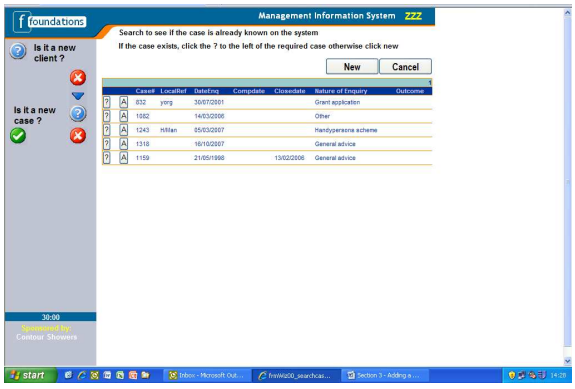


Step 3 (Existing Client)

If a Client already exists, type their name (or part name) into the NAME box, and press SEARCH.



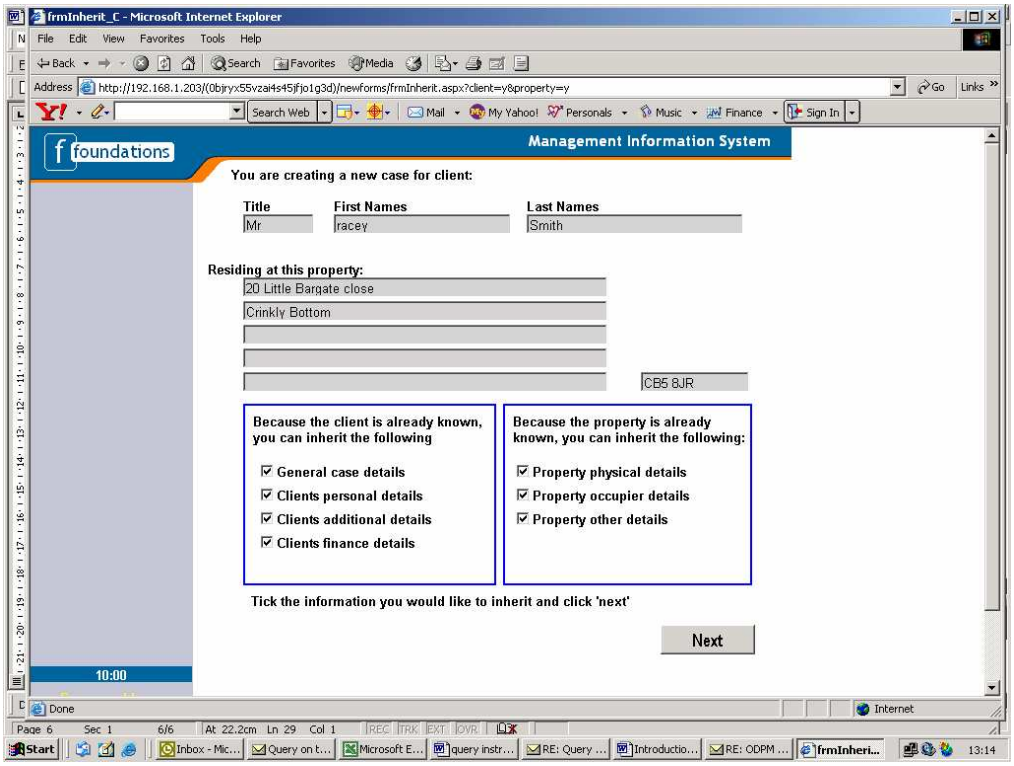
All clients meeting that name criteria will appear as shown. Where a large number of clients meet the search criteria, these will be shown over several screens. Each screen can be accessed by clicking on the numbers shown on the turquoise bar underneath the Cancel button. Select the desired client by clicking on the „**?**' to the left of the client□s name.



NB: The notation to the right of each client indicates the number of cases associated with the client which are open, and the number of cases that are closed. E.g. 4(1) means: 4 cases open and 1 closed. To select an existing case, click the **?** on it's left

Step 4 (New case)

To create a new case for the client, click NEW
You will be asked whether you want to use the address currently associated with that client.
To use the address click 'ACCEPT'.
To create a new address, click NEW**.**
(Add Initial Enquiry Details as explained above)



The system allows you to update client and property information for each new case, without losing historical information saved on old cases. Whenever a new case has been created using an existing client and property, a screen giving the option of changing details of that client and property is displayed: The default option is to accept all current client and property information (all boxes ticked). To update information on any of the screens, remove the tick from the appropriate boxes. **I would advise that "General case details" should not be carried across (untick the box) as this will take across the work that was completed on the previous case.**

4 – Client Details

The table below shows what information is required for each type of case:

Case Outcome	Name	Address (first line min)	Enquiry Date	Date of birth	Ethnicity	Health and disabilities (As appropriate)	Tenure	First Visit Date	Cost of Building Works (Ex Vat)	SP Outcome (As appropriate)	Practical Completion Date
Client referred on – no support given	✓	✓	✓	×	×	×	×	×	×	×	×
Client has received substantial advice	✓	✓	✓	✓	✓	✓	✓	✓	×	✓	×
Client has received handyperson service	✓	✓	✓	✓	✓	✓	✓	×	×	✓	×
Client has had part work/all work done	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

For non-HP cases we need to collect:

Client's name
Address
Date of enquiry
Date of birth (FEMIS then calculates their age) – guess 1st Jan (someyear) if won't tell you
Ethnicity
Health (Assumes "healthy" if nothing completed. Only tick one Disability Check Box)
Tenure
First contact date, Case worker and technical officer first visit dates
Cost of work done
SP outcome
Practical completion date
Closed date

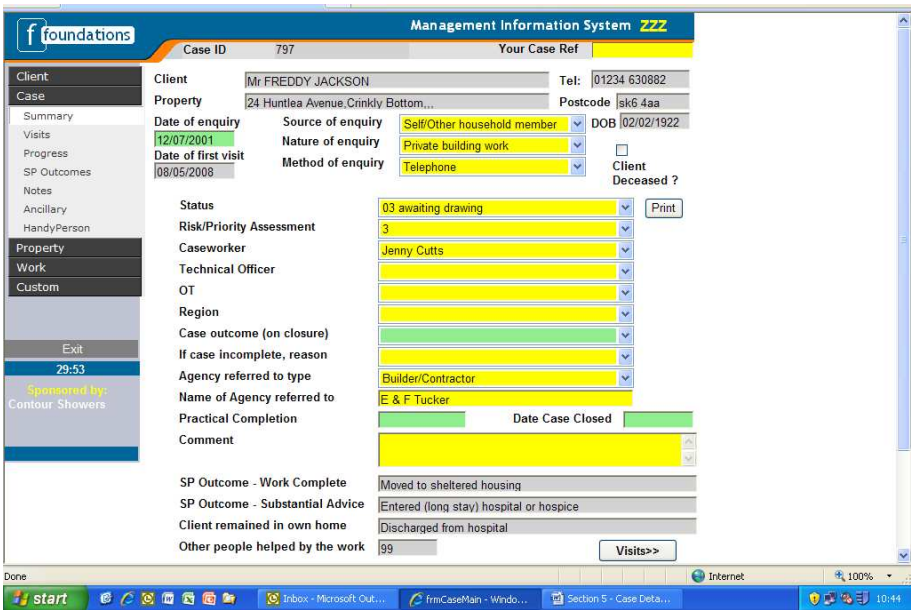
To provide meaningful reports we need to also collect:

Region
Case status
Case outcome - client referred on / all work completed etc
Date of Home Safety Assessment if given

5 – Case Details

This section is not intended as a field-by-field guide to filling in case data.
Each screen associated with case data will be displayed and those fields with specific characteristics or relevance to the Supporting People workbook will be explained.

Summary



First visit (we want this to record our first contact with the client)

This is read only on the summary screen.
We want this to show the date we first made contact with the client so we must enter a first "visit" on the visit page to reflect this.

- The visits tab should be used to record the first contact with the client.
- This information is then analysed in the quarterly reports – it is important that we collect this information here, otherwise the first contact date will be recorded as either the Case worker or Technical Officer first visit date.
- The letter **T** (upper or lower case) in this field will input today's date.
- The date and note (along with the user's name) will appear in the "first visit" box .

Status

Choose from:
Benefits advice
Enquiry
Handyperson
Home Safety Assessment
Major adaptations
Minor adaptations (non-structural) – (Should be completed for MID-DEVON ONLY)
Minor adaptations (structural)
Repairs

Region

Must be selected as soon as the case is opened

Case Outcome (On Closure)

This field must be filled in for all closed cases.
Choose from:

Client referred on:

- The client has had no direct support from the HIA
- Referred on to another agency.
- Client has not received a home visit (first visit) from the HIA.

Client has been given substantial advice:

- Client will have received a visit from the HIA or visited the office.
- No work has been carried out on the property.
  (This may be because there was no requirement for the work to be done, or that the client has chosen for the work not to be done for any reason)
- Independent living has been supported as a result of the advice given by the HIA.

Client has received a handyperson service:

- "Handyperson" in this instance, is any type of non-core work that is carried out by the HIA (E.g. Falls prevention, Hospital release)
- **HP first visit date does not pull through into the "First visit date" box. It must be entered on the progress screen**
- If a Home Safety Assessment is carried out this must be entered on the progress screen, otherwise it will not be counted in the reports. It can be recorded as a job type on the works page.

Client has had part work / all work completed:

- Part work and all work completed will be treated as the same outcome for SP purposes.
- Includes all building work undertaken for the client
- Must only be chosen if the client has entered into some form of contract with the contractor.

Practical Completion Date

- This date is to be used **only** for cases where the outcome is "Part Work" or "Work completed" and defines the date that the work has been completed on the property
- A date input in this field will automatically appear in the correct field on the Progress Screen (and visa versa)
- The letter **T** (upper or lower case) in this field will input today's date

Final Inspections

- Record on the progress screen
- Complete practical completion date but keep case open until final inspection carried out

Date Case Closed

- **This must be recorded for all completed cases.**
- **This date determines the reporting quarter in which the case is entered into the Supporting People Workbook**.
- The letter **T** (upper or lower case) in this field will input today's date

Supporting People Outcomes

These are read only on this screen and must be entered on the "SP Outcome" Screen.

Dates

Client first contacted (first visit date in FEMIS – enter via “visit” tab)
Caseworker first visit date
Technical officer first visit date
Date of practical completion (NOT HP. Only “all work completed” or “part work completed” -Core)
Date case closed

Extra info:

Vulnerability and Cautionary Alerts (VA and CA)
There are also 2 variables called VA and CA at the bottom of the Client Personal screen. These are designed so that everyone who views the case for this client can identify whether they have vulnerability issues, such as being deaf or a cautionary alert may say that you should not visit alone. As there is no way FEMIS can highlight these dangers when you open the case it is recommended that you include CA or VA after the clients surname, for example: Smith - VA. The DCR manual has further information regarding this.

Where client heard about DCR
There is now a drop down box to report where clients have heard about DCR. There is a text box if you are required to specify further details.

Queries regarding dates

Closing cases:
Final inspections must be carried out before the case is closed. The practical completion date should reflect the date when the Contractor leaves the property. This is the information that will be picked up in analysis of the DFG timeline. Until the case is closed it will not be included in analysis.

Delays regarding grants
This information is already collected. We will record the date when the grant was submitted (in the actual column) and the date when approved (in the actual column)

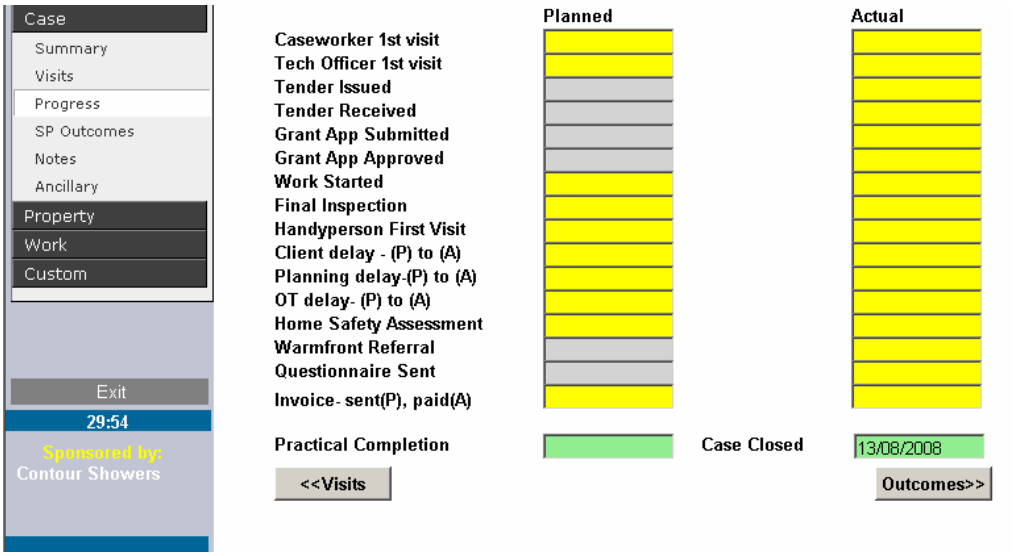
New fields on the Progress screen:
“Client delay” to record delays due to the client (for example delaying work due to ill health), “OT delay” (eg: waiting for OT / Grants to approve drawings before they go to tender) and “Planning delay” where you can record delays due to building regulations and planning delays.

For all 3 of these variables record the date when the delay began in the planned column, and the date when the work started again in the actual column, eg: for planning / building regulations delays fill in “planned” date when planning / building regulations are submitted, fill in “actual” date when approved.

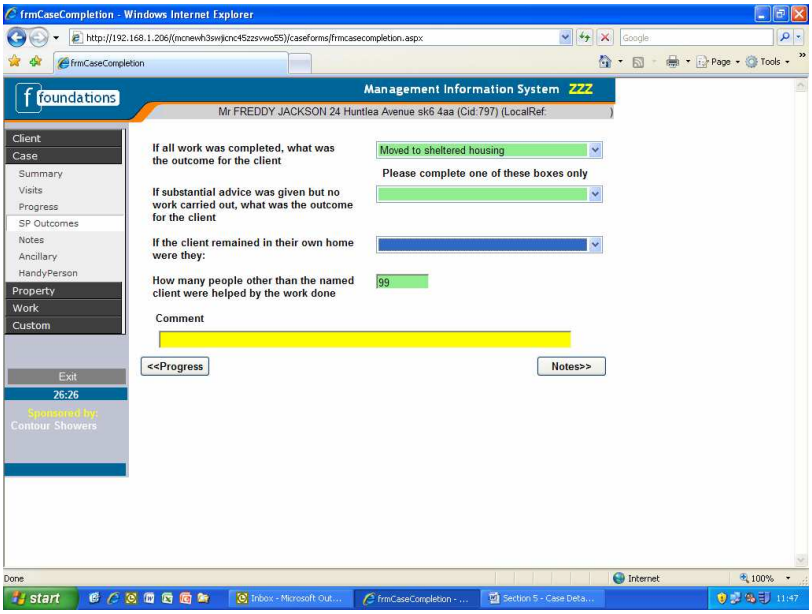
Please ask if you are unsure what dates to enter.

Preliminary enquiries / Feasibility study
Close case after your visit rather than leaving open. Report as substantial advice.

Progress Screen


Case
Summary
Visits
Progress
SP Outcomes
Notes
Ancillary
Property
Work
Custom
Exit
29:54
Sponsored by:
Contour Showers
Planned
Actual
Caseworker 1st visit
Tech Officer 1st visit
Tender Issued
Tender Received
Grant App Submitted
Grant App Approved
Work Started
Final Inspection
Handyperson First Visit
Client delay - (P) to (A)
Planning delay-(P) to (A)
OT delay- (P) to (A)
Home Safety Assessment
Warmfront Referral
Questionnaire Sent
Invoice- sent(P), paid(A)
Practical Completion
Case Closed
13/08/2008
<<Visits
Outcomes>>

SP Outcomes



This screen has been specifically designed to populate the Outcomes Section of the SP Workbook, and must be filled in for all completed cases.

If all work was completed, what was the outcome for the client?

- Complete if Case Outcome is that the client has received a handyperson service, has had part work completed or has had all work completed
- If the client has received no support from the HIA, then leave blank

If substantial advice was given but no work carried out, what was the outcome for the client?

- Complete this only if the Case Outcome is that the client has received substantial advice
- If the client has received no support from the HIA, then leave blank

If the client remained in their own home were they…?

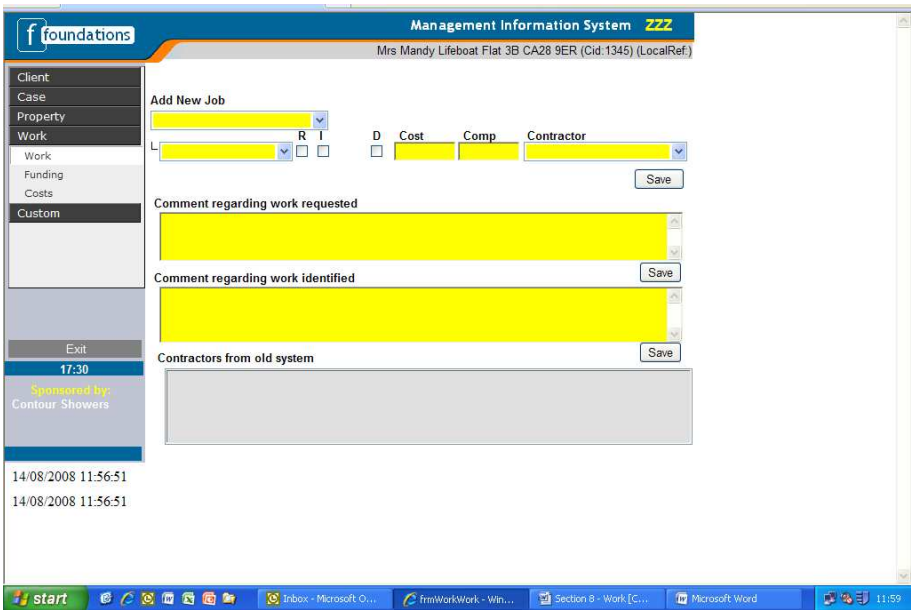
Fill this in only if either of the boxes above indicates that the client has remained in their own home, or has died.

How many people other than the named client were helped by the work done

If there are people apart from the client who will benefit from the work that has been done, you can add the number here

6 – Work

Work



This screen allows work of all types to be recorded, including both “Core” jobs and all types of additional services. It also allows a record to be kept of whether the work was:

- Requested by the client (R)
- Identified as being needed by the TO (I), or
- Completed (D).

It also allows each job to be broken down into its elements

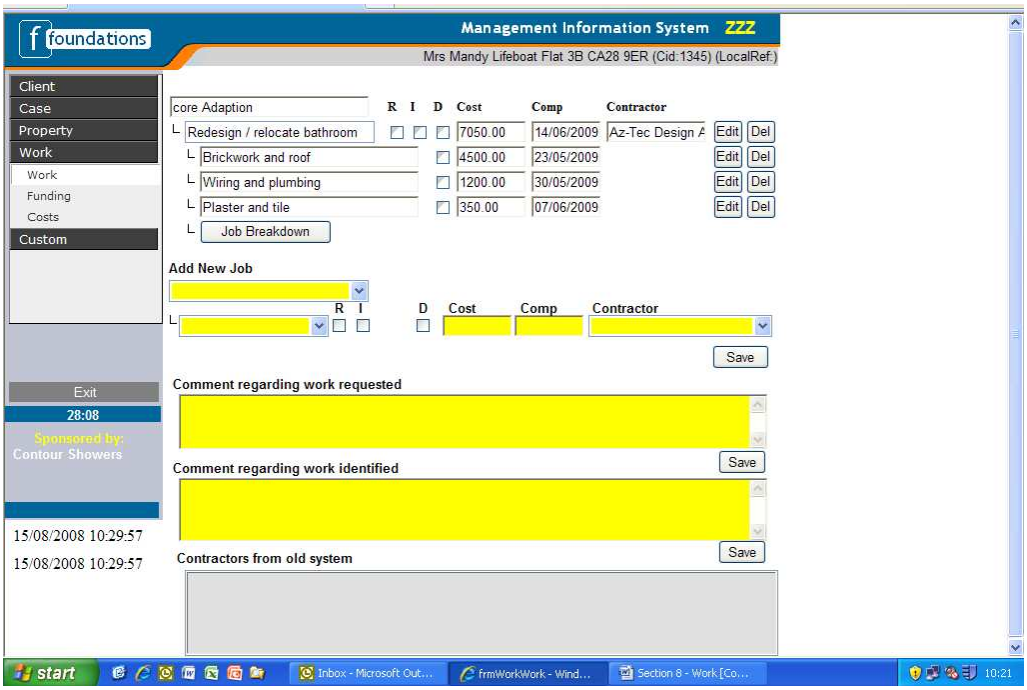
- At each stage of that job identify the cost, when it was completed, and who the contractor was.

Add New Job

Example: The client has been given a DFG for a number of adaptations to their home. It includes an extension with a walk in shower. In addition, the house requires rewiring. This rewiring work is being paid for through equity release.

Example: Recording a case

Select “Core Adaptation” from the upper menu and Redesign/relocate bathroom” from the lower menu. Select the contractors name then click SAVE.



You may want to breakdown this job further. To do this, press JOB BREAKDOWN. Here we have added three elements to the job, with a cost breakdown and completion date for each.
Note: FEMIS doesn’t sum the costs or work out the latest completion date.

Funding (Located on the “Work” dropdown menu)

The funding screen is divided into sections reflecting the main sources of funding for HIA type work. NB FEMIS will add up all the individual funds and give you a nice red total at the bottom, but is far too shy to do this whilst you watch, so you need to go out of this screen and then go back in again. The specifics of this page will be covered in your induction at your local office.

Costs (Located on the “Work” dropdown menu)

- The cost screen provides a cost summary of all jobs completed during the case.
- The field at the top of the screen is read only and shows the total of all the costs allocated to jobs on the Work screen (Building work costs, exc. VAT).
- At the bottom of the screen (read only fields), the total of all the entries on the funding screen is shown in the Funding field, the total of costs (including VAT and Fees) is shown in the Costs field and the [Funding – Costs] field shows the difference between the two.

BOTH FUNDING AND COSTS MUST BE FILLED IN OR INFORMATION MAY NOT BE COLLATED FOR REPORTING

7 – Closing a Case

These fields should be completed before entering a completion date on ANY CASE

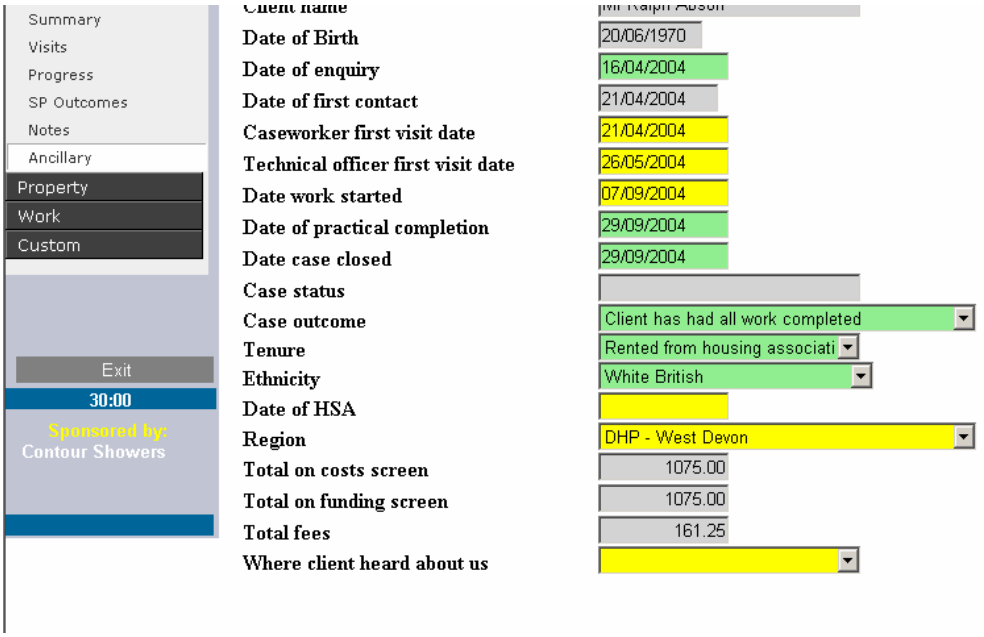
Case Outcome	Name	Address (first line min)	Enquiry Date	Date of birth	Ethnicity	Health and disabilities (As appropriate)	Tenure	First Visit Date	Cost of Building Works (Ex Vat)	SP Outcome (As appropriate)	Practical Completion Date
Client referred on – no support given	✓	✓	✓	×	×	×	×	×	×	×	×
Client has received substantial advice	✓	✓	✓	✓	✓	✓	✓	✓	×	✓	×
Client has received handyperson service	✓	✓	✓	✓	✓	✓	✓	×	×	✓	×
Client has had part work/all work done	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Under development

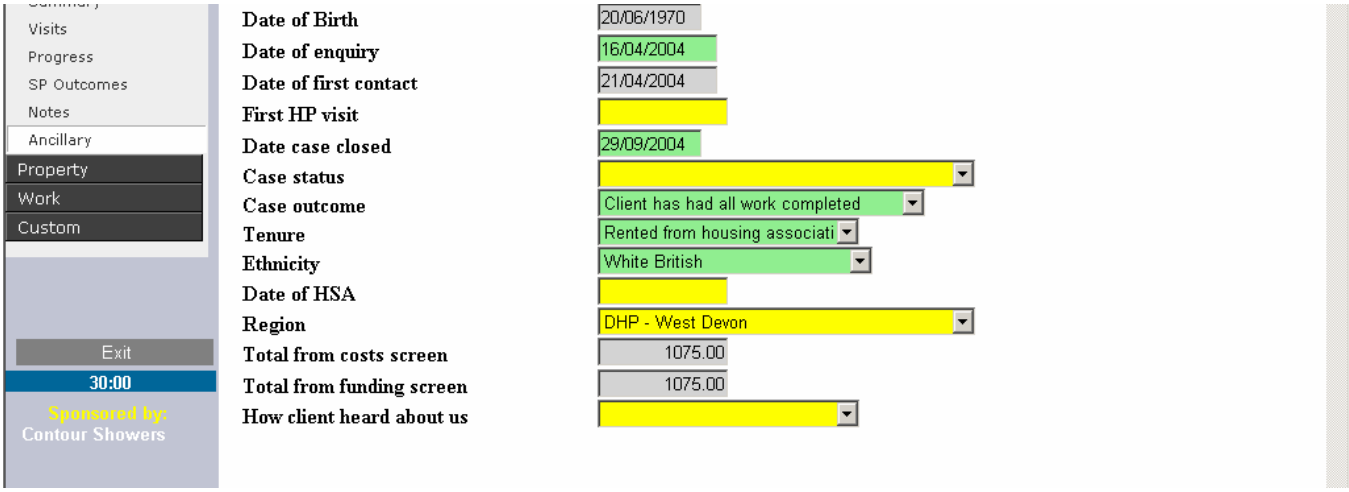
To ensure that all necessary data can be collected I have added some pages to FEMIS in the "Case", "Ancillary" page.

These pages highlight all the data that is expected to be collected for the different types of cases (enquiries / HP jobs / Major adaptations etc) and shows you where data is missing. You then have the option of adding the data in here (apart from the grey boxes which you will need to go back to the main pages to input). This will ensure that cases can be closed with all data complete.

All work except HP - Case, Ancillary, Data checks:



HP work - Case, Ancillary, HP screen:



8 - Error Reports in FEMIS

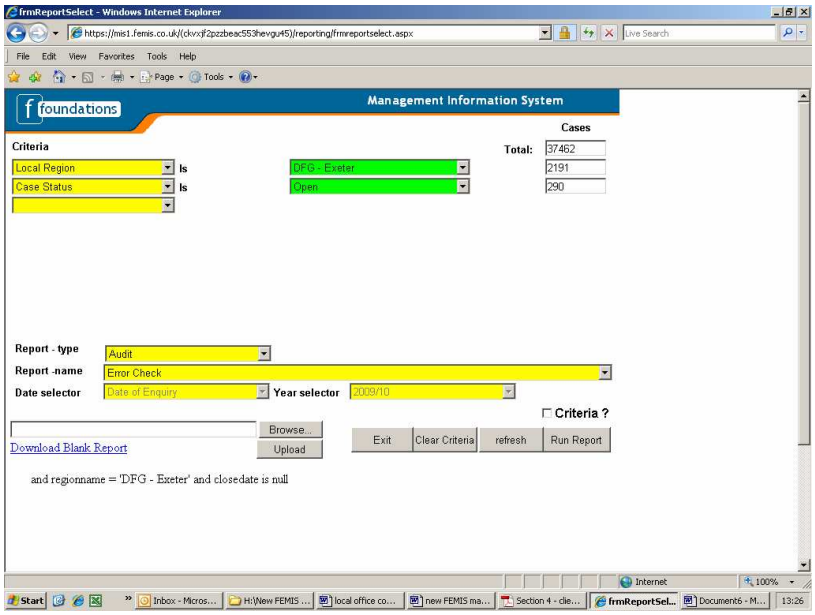
Error check in FEMIS will advise you when you have put dates in for cases that don't "work" – for example you've put in an enquiry date in March 2010 but a completion date of April 2009. It's not the most wonderful of things that you could ask FEMIS to do as it doesn't look at all dates (like technical officer visit dates etc) but will look at the important ones that are used for the SP workbook.

You will need to run one report for cases that are open at the moment, and another for cases that have been closed in the last quarter / closed this financial year

Open cases

Select "local region" on the left, then "case status". On the right select "open" at the bottom, then your local office at the top.

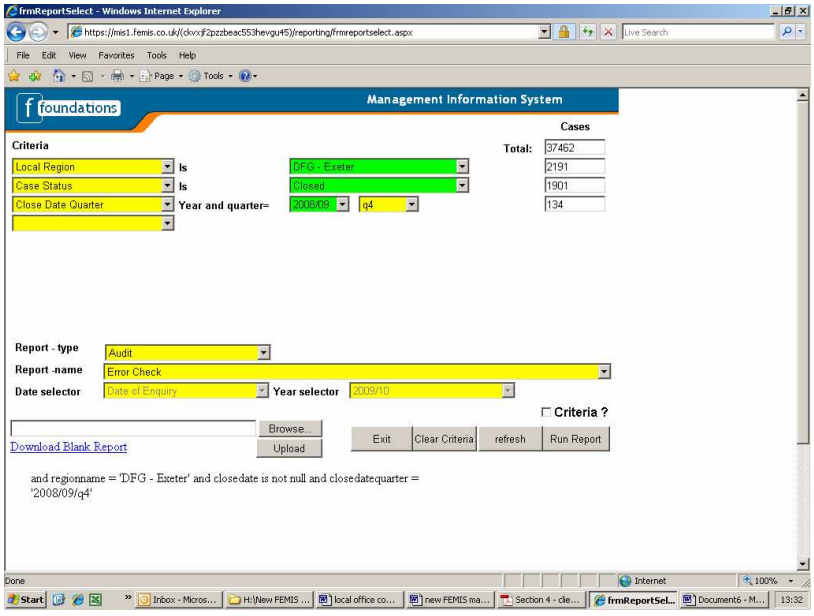
Ensure that:
Report type says "Audit",
Report name says "Error check"
Press "Run report"



Cases closed this quarter

Select "local region" on the left, then "case status" and "close date quarter". On the right select "2008/9" and "q4" at the bottom, then "closed" and your local office at the top.

Ensure that:
Report type says "Audit",
Report name says "Error check"
Press "Run report"



The report often takes a few minutes to run but you should get something like this:

					Audit Errors Report				
					DCHA - COMBINED 8				
		Local	Case						
sysID	datechanged	Case ID	Reference	Title	Firstname	Lastname	Field	Description	Close Date
ddd	27/04/2009	116658	HP	Miss	K	Weeks	Close Date	Is before date of enquiry	14/04/2009
ddd	27/04/2009	116658	HP	Miss	K	Weeks	Practical Completion	Is before date of enquiry	14/04/2009
ddd	27/04/2009	116658	HP	Miss	K	Weeks	First Visit Date	Is before date of enquiry	14/04/2009
ddd	15/04/2009	116478	HP/PR	Mrs	G	Sadler	First Visit Date	Is before date of enquiry	15/04/2009
ddd	23/04/2009	116299	HP/PR	Mrs	R	Lowe	Practical Completion	is before First Visit	20/04/2009
ddd	23/04/2009	116299	HP/PR	Mrs	R	Lowe	Close Date	Is before the first visit date	20/04/2009
ddd	15/04/2009	116294	CR	Mr	Harry	Yeoll	First Visit Date	Is before date of enquiry	07/04/2009
ddd	15/04/2009	116294	CR	Mr	Harry	Yeoll	Close Date	Is before date of enquiry	07/04/2009
ddd	27/04/2009	116155	A/C	Mrs	Bettina Margaret	Hill	Close Date	Is before the practical completion date	04/04/2009
ddd	31/03/2009	115640	HP/PR	Mrs		Rose	First Visit Date	Is before date of enquiry	27/02/2009
ddd	22/04/2009	115548	MA	Mrs	Gladys	Badcock	Practical Completion	is before First Visit	22/03/2009
ddd	22/04/2009	115548	MA	Mrs	Gladys	Badcock	Close Date	Is before the first visit date	22/03/2009
ddd	07/04/2009	115342	HP/PR	Mrs		Terry	First Visit Date	Is before date of enquiry	12/02/2009
ddd	19/03/2009	115094	Cr-DFG	Mr	Edward	Shopland	Close Date	Is before the first visit date	05/02/2009
ddd	27/01/2009	114826	HP/SS	Miss	Janice	Gibbons	Practical Completion	Is before date of enquiry	21/01/2009

This will highlight cases where the enquiry date is before the close date (for example) and should be corrected